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Asset-Map CEO Adam Holt

## NEWS

### **Q&A: H. Adam Holt, Founder and CEO of Asset-Map**

**Now in its fourth year, the virtual advisor technology conference AdviceTech.Live is run by Asset-Map, features 10-minute presentations from 20 companies and will be free to attend for the first time.**

Rob Burgess | Aug 24, 2023

AdviceTech.Live, an online-only advisor technology conference born during COVID-19 pandemic-enforced lockdowns, will return for a fourth year, this time for free.

The conference, run by the popular visualization software provider Asset-Map, brings together advisor technology vendors who demo their products for attendees.

In addition to Asset-Map, other companies scheduled to present in 10-minute segments from 1 to 5 p.m. EST Thursday, Nov. 2, and Friday, Nov. 3 include AdvisorEngine, Bento Engine, Estate Guru, FMG Suite, Forward Lane, FP Alpha, FP Pathfinder, Holistiplan, Hubly, Income Conductor, Income Lab, Lumiant, Mobile Assistant, Morningstar, Nitrogen, Redtail, Snappy Kraken, Tolerisk and VRGL.

H. Adam Holt, founder and CEO of Asset-Map, spoke with Wealthmanagement.com about the conference, what's different, and why they decided to make it free this year.

*This Q&A has been edited for style, length and clarity.*

**Wealthmanagement.com:** What worked for last year's conference? What's staying the same?

H. Adam Holt: What's working is the 10-minute speed demos. ... Some of them will be revealing brand-new tech that's never been seen before. All of them are showing around a theme this year, which is advice engagement and/or the delivery of advice through tech enablement.

**WM:** What's new about this year's conference?

**HAH:** We have two (benefactor partners) this year, not four: Invest In Others, which is a very important organization for financial advisors, and Leukemia and Lymphoma Society (in memory of) our friend Gavin Spitzner, who we lost in 2023. (He) was an advisor to five of the companies that are presenting. There was a groundswell to do something aligned with Gavin.

It's in November. It's later than normal. We did that to work with a lot of the conferences out there to not compete with them. By the time we get to November, no one's going to be traveling. They're going to want to sit at home and virtual works well.

We broke it (up) over two days. We had gotten feedback that it was too long to put it all in one day. People couldn't even handle it. They were forced to look at the recordings.

It's free to all financial advisors. There's no door ticket charge. There used to be and that's how we raised the money. This year we raised a lot of money from title sponsors.

**WM:** Why was it important to make it free this year?

**HAH:** We had 400,000 unique visitors last year. We said, "Let's stop any reason for them to say 'no.'" We made it free for all financial advisors and students. ... We want students to learn what's changing in the world of advice delivery. How they can get involved. What are (the) job opportunities for them. We have a huge initiative (of) getting ... students from the various colleges. We make special arrangements for them all to get access.

**WM:** What else do you want attendees to know?

**HAH:** We've heard this (term,) "pay-to-play." It's a pain point in our industry. ... We didn't want a pay-to-play system where someone could just

outbuy somebody, put their banner in front of somebody else and the little guy feels like they never get a voice. The real key is we want equal billing for everybody. Ten minutes. The same. You can't buy more time. You can't buy less. ... We think of this as we're hosting a big potluck party. It's not about us. We want to create a venue. We keep hosting this party and it just keeps getting bigger and bigger and bigger.